

Training Center – Community Services Boards

Admission and Discharge Protocols for Individuals with Intellectual Disabilities

Effective March 1, 2011

These protocols provide consistent direction for implementation of those activities required of the staffs of the training centers operated by the Department of Behavioral Health and Developmental Services (DBHDS) and the Community Services Boards, established pursuant to § [37.2-501](#) of the Code of Virginia and the Behavioral Health Authority, established pursuant to § [37.2-602](#), which are hereinafter referred to as CSBs, in the implementation of emergency, respite, and regular admissions and discharge planning.

These protocols should be used with the following DBHDS forms, which are available on the DBHDS website at <http://www.dbhds.virginia.gov/ODS-MR-ICF.htm>

APPLICATION FORMS:

- Initial Referral Form – (all admissions):
Admissions Management Committee (AMC) Referral Form – TC
[DBHDS # 1168eID 2010](#)
- Application for Training Center – Emergency & Respite – [DBHDS 3223eID 8-2010](#)

Instructions: Statewide application for Training Center Services (Statewide Application Instructions – ID Application Package - 1146,1147,1166,1167,1168
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Forms for statewide application for Training Center Services (regular admission):

- Family Information: 1146eID- Training Center Application Package) – PDF
- Identifying Information (1146AeID- training Center application package) – PDF
- Immunizations History (1146DeID – Training Center application package) – PDF
- Medication History (1166eID- training Center Application Package) – PDF
- Service History (1167eID – training Center Application Package) – PDF
- Service Requested (1168eID- Training Center Application package) – PDF
- Skills Checklist - DBHDS 1147eID – Training Center Application package)
- Level of functioning – ICFMR DBHDS 3222eID ODS
<http://www.dbhds.virginia.gov/documents/forms/3222eID.pdf>

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- [Supports for Living Booklet \(DBHDS # 3321eID\)](#) (Parts A and B)

DBHDS # 3221eID – 2010

- Instructions Supports for Living Booklet INST3321eID – 2010

Person Centered Planning (PCP) forms for ICFMR Facilities **(on CODIE and public website): (eff. 7-1-2009)**

Important To-For Worksheet (3128eICFID 3128eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

1- Essential Information Long form (3129eICFID 3129eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

2- Essential Information Chart Filing Order (3130eICFID 3130eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

3- Part II Profile IV - VA ISP Blank (3131eICFID 3131eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

4- Part V Plan for Supports (3132eICFID 3132eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

5- Discussion Record Blank (3133eICFID 3133eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

6- Communication Plan II (3134eICFID 3134eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

7- Personal Schedule Blank (3135eICFID 3135eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

8- QMRP Review - Revised (3136eICFID 3136eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

9- ISP Change Note (3137eICFID 3137eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Word](#)

10- ISP Checklist - data (3138eICFID 3138eICFMR Person Centered Process PCP-ODS) | [PDF](#) | [Excel](#)

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This version replaces the 2003 version and all preceding versions of these protocols.

Virginia Department of Behavioral Health and Developmental Services

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Supports for Living Booklet

Forms (forms are available on the DBHDS website)at

<http://www.dbhds.virginia.gov/ODS-MR-ICF.htm>

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DEFINITIONS

The following words and terms, when used in these protocols, shall have the following meanings, unless otherwise indicated.

Admission Definitions:

Emergency admission: the temporary acceptance of an individual with mental retardation (intellectual disability) into a training center when immediate supports are necessary and no other community alternatives are available ([12VAC35-200-10](#))

Respite admission: residential supports provided to an individual with mental retardation (intellectual disability) on a short term basis because of the emergency absence of or need to provide routine or periodic relief of the primary caregiver for the individual. ([12VAC35-200-10](#))

Regular admission: the acceptance of an individual with mental retardation (intellectual disability) to a training center for a period typically longer than 21 consecutive days. A regular admission is based on consideration of the preliminary evaluation and requires a judicial certification in accordance with § [37.2-806](#) of the Code of Virginia.

Admissions Management Committee (AMC): Each training center has an admissions committee to review each application for admission and make recommendations to the facility director. This committee should be diverse and comprised of the necessary training center staff, the ID Director /designee from each CSB within the training center's catchment area, the DBHDS Community Resource Consultant (CRC) for the region, representatives of the nearest state hospital, and the DBHDS –CO Facility and Community Resource Manager. The Director of Social Work for the training center or his/her designee serves as the Coordinator for the AMC and conducts the meetings, unless agreed upon otherwise by the training center and CSB representatives within that catchment area.

Authorized representative (AR): is a person permitted by law or regulations to authorize the disclosure of information and consent to treatment and services, including medical treatment, or participation in human research on behalf of an individual who lacks the mental capacity to make these decisions. The decision-making authority of an authorized representative recognized or designated under these regulations is limited to decisions pertaining to the designating provider. [[12VAC35-115-30](#)]

Community Services Board (CSB): the public body established pursuant to §[37.2-501](#) of the Code of Virginia that serves the area in which an adult resides or in which a minor's parent or guardian resides. For the purpose of these protocols, CSB also includes a behavioral health authority established pursuant to §[37.2-602](#) of the Code of Virginia.

Discharge plan: The Discharge Plan, Part B of the [Supports for Living Booklet \(DBHDS # 3321eID\)](#) is a written plan that establishes the criteria for an individual discharge from a service

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and identifies and coordinates delivery of any services needed after discharge. The Discharge Plan is prepared by the CSB providing support coordination or case management in consultation with the training center pursuant to § [37.2-505](#) of the Code of Virginia. This plan is initiated when the individual is admitted to the training center and documents the planning for supports and services needed after discharge.

Individual: a person receiving supports or services.

Judicial Certification: a court proceeding conducted pursuant to § [37.2-806](#) of the Code of Virginia that determines the eligibility for admission of persons with mental retardation (intellectual disability) to a training center.

Mental Retardation (Intellectual Disability): a disability originating before the age of 18 years, characterized concurrently by (i) significantly subaverage intellectual functioning as demonstrated by performance on a standardized measure of intellectual functioning, administered in conformity with accepted professional practice, that is at least two standard deviations below the mean; and (ii) significant limitations in adaptive behavior as expressed in conceptual, social, and practical adaptive skills.

Personal Support Team or Interdisciplinary Team (PST or IDT): a team composed of those individuals (professionals, paraprofessionals, and non-professionals) who possess the knowledge, skills, and expertise necessary to accurately identify the comprehensive array of the individual's needs and design a program that is responsive to those needs.

Regional Protocol/ Regional Utilization Management Agreement (RUM): an agreement among the CSB Executive Directors and/or ID Directors, training center director, and state hospital director in a Health Planning Region that addresses emergency admissions of individuals with mental retardation (intellectual disability) and mental illness.

Support Coordinator: the person who, on behalf of the CSB, performs case management duties. This includes the duties listed in [12 VAC 35-105-1240](#).

Training Center: a facility operated by Department for the treatment, training, or habilitation of persons with intellectual disability.

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I. Admission (regular admission) to Training Centers

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1.1		Section 37.2-505 of the Code of Virginia requires CSBs to provide preadmission screening services. Section 37.2-806 requires a preadmission screening report from a CSB that recommends admission to a training center, prior to the initiation of a proceeding for judicial certification. Accordingly, it is the responsibility of the CSBs to perform a pre-admission screening either in-person or by means of a two-way electronic video and audio communication system, that confirms the appropriateness of the individual's admission to a training center.
1.2		The CSB support coordinator, after review of all pertinent information and consideration of all the options and if the individual or his or her authorized representative has made the documented choice of a training center admission shall complete an application packet for regular, admission to a training center. The packet shall include the most recent Person Centered Supports plan, as well as the most recent Supports Intensity Scale (SIST TM) long form report and Section 4 Risk Assessment.
1.3	Training center staff shall follow the <i>Regulations for Voluntary Admissions to State Training Centers</i> , 12 VAC 35-190 .	
1.4	The Director of Social Work shall review the packet to ensure complete information and call the AMC meeting. This application packet will be taken to the training center AMC, in accordance with the Regional Utilization Management (RUM) agreement.	The CSB shall complete an admission packet and send it to the training center (Director of Social Work) serving the areas in which the individual, or if a minor, his parent or guardian currently resides. The CSB Support Coordinator/designee shall present the case information at the AMC meeting.
1.5	Training center staff may conduct a face to face interview with the individual to ensure the appropriateness of the admission, provided it does not delay the admission.	Before admission, the CSB support coordinator shall arrange for someone to serve at the appointment of the Training Center director as the individual's authorized representative, if one is necessary, for purposes of admission. Refer to 12 VAC35-115-145 and 12 VAC35-115-146)
1.6	Within 10 working days of receipt of the completed application packet for regular admission, the training center director shall notify the CSB support coordinator in writing of his/her decision on the admission request.	The CSB support coordinator shall advise the individual or authorized representative of the training center's decision. If the individual is determined to be appropriate for regular admission, the CSB support coordinator shall assist the AR in initiating judicial certification pursuant to § 37.2-806 . If the individual is determined to be inappropriate

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		for admission by the training center director, within 10 working days of receipt of the decision, the CSB support coordinator, the individual or his authorized representative may make a written request for a reconsideration of that decision, pursuant to 12 VAC 35-190-41 .
1.7	Upon receipt of judicial certification, a date for regular admission into the training center shall be set by the director and forwarded to the CSB support coordinator who is working with the individual who is the subject of the certification.	
1.8	Upon admission, if the individual does not have capacity to make the necessary decisions regarding services and supports, the training center director shall appoint an authorized representative in accordance with 12 VAC 35-115-146 .	
1.9	<p>Upon admission, if the individual has Medicaid, the training center shall complete the MAP119, MAP121, and MAP 121A for initiation of Medicaid payment reimbursement and mail them to the address listed below:</p> <p>Division of Long-Term Care - QMR Supervisor Department of Medical Assistance Services 600 East Broad Street, 10th Floor Richmond, Virginia 23219</p> <p>OR THEY MAY FAX TO: QMR Supervisor at 804-612-0050</p>	

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II. Training Center Transfers (Interstate, Intrastate and Intersystem)

	Training Center Responsibilities	CSB Responsibilities
2.1	<p>Interstate Transfers for mental retardation (intellectual disabilities): (from another state to Virginia)</p> <p>Upon receipt of the interstate package from the interstate transfer coordinator (ITC) in the sending state, the Central Office interstate transfer coordinator for mental retardation (intellectual disabilities) shall review the package for the required information. The DBHDS Central Office ITC shall then send the package to the Director of Social Work for the appropriate training center.</p> <p>The Director of Social Work shall convene the AMC to review the packet and determine whether to accept or deny the individual for transfer. The director or his/ her designee shall communicate the decision within 10 working days of the meeting to the DBHDS Central Office ITC for MR/ID interstate. If transfer is denied, the reasons for denial will be included in the communication.</p> <p>The director or his/ her designee shall collaborate with/notify the ID Director of the CSB that will be responsible for discharge planning if the individual is accepted for admission. The CSB responsible will be the one serving the catchment area where the individual shall reside upon discharge from the training center.</p>	
2.2	<p>Upon admission, if the individual has Medicaid, the receiving training center shall complete the MAP119, MAP121, and MAP 121A for initiation of Medicaid payment reimbursement and mail them to the address listed below:</p> <p>Division of Long-Term Care - QMR Supervisor Department of Medical Assistance Services 600 East Broad Street, 10th Floor Richmond, Virginia 23219</p> <p>OR THEY MAY FAX TO:</p>	

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	QMR Supervisor at 804-612-0050	
2.3	<p>Intersystem Transfers: (To a training center, from a state operated mental health hospital (state hospital)):</p> <p>2) A request for screening and transfer shall be made by the state hospital to the training center Director of Social Work (or equivalent position) if:</p> <ol style="list-style-type: none"> It is determined the individual does not need treatment in a state hospital but requires care in a training center; or An individual with mental retardation(intellectual disability) who requires training center care is stabilized in a state hospital after requiring psychiatric treatment. <p>3) The training center shall schedule an on-site screening within two business days, in collaboration and coordination with the state hospital.</p> <p>4) All relevant pertinent transfer documentation shall be faxed by the state hospital to the training center Director of Social Work, prior to the scheduled date of the screening.</p>	<p>1) Upon admission to the state hospital, of an individual with mental retardation (intellectual disability), the CSB shall notify the training center Director of Social Work (or equivalent position). If notification cannot be made at the time of admission, the CSB shall notify the training center Director of Social Work (or equivalent position) of the admission by 10:00 a.m. of the first business day after admission to the mental health hospital.</p> <p>5) The CSB Support Coordinator shall complete the appropriate admission documentation and forms, depending on the type of training center admission being requested. The CSB Support Coordinator shall fax the information to the training center prior to the date of the screening.</p> <p>6) The CSB Support Coordinator shall be</p>

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	<p>7) A determination regarding acceptance of the transfer by the training center shall be made within one business day of the screening. Notification of the decision in writing by the training center director shall be communicated to the CSB Support Coordinator and the state hospital that same day.</p>	<p>present, in person, by telephone, or polycom, for the interview conducted by the training center at the time of the scheduled screening for transfer.</p> <p>8) If the decision for transfer is denied, the Executive Director of the CSB may request reconsideration in accordance with 12 VAC 35-190-41 – regular admissions; and 12 VAC 35-200-20 – respite care admissions. [Note: there are not any reconsideration provisions if an emergency admission is denied.]</p>
2.4		<p>The CSB support coordinator shall advise the individual or authorized representative of the training center’s decision. If the individual is determined to be appropriate for <u>regular</u> admission, the CSB support coordinator shall proceed with assisting the AR in initiating judicial certification, pursuant to §37.2-806 of the Code of Virginia.</p> <p><i>Note:</i> A judicial certification is not required for an emergency or respite admission.</p>
2.5	<p>Upon any admission to the training center, if the individual has Medicaid, the training center shall complete the MAP119, MAP121, and MAP 121A for initiation of Medicaid payment reimbursement and mail them to the address listed below:</p> <p>Division of Long-Term Care - QMR Supervisor Department of Medical Assistance Services 600 East Broad Street, 10th Floor Richmond, Virginia 23219</p> <p>OR THEY MAY FAX TO: QMR Supervisor at 804-612-0050</p>	

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III. Emergency Admissions

3.1		The CSB support coordinator will complete the emergency admission application and submit to the Director of Social Work at the respective training center.
3.2	The Director of Social Work will review for complete information and will convene the AMC for review of the request.	
3.3	Within 24 hours of receiving a request for emergency admission, the training center director, or designee, shall inform the CSB whether the individual is eligible for emergency admission and whether the training center is able to provide emergency services. If the training center is able to provide emergency services, arrangements shall be made to effect the admission as soon as practical. (12 VAC 35-200-30 C)	
3.4	Upon admission, if the individual does not have capacity to make the necessary decisions regarding services and supports the training center director shall appoint an authorized representative pursuant to 12VAC35-115-146 .	
3.5	<p>Upon admission, if the individual has Medicaid, the training center shall complete the MAP119, MAP121, and MAP 121A for initiation of Medicaid payment reimbursement and mail them to the address listed below:</p> <p>Division of Long-Term Care - QMR Supervisor Department of Medical Assistance Services 600 East Broad Street, 10th Floor Richmond, Virginia 23219</p> <p>OR THEY MAY FAX TO: QMR Supervisor at 804-612-0050</p>	

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IV. Respite Admissions

4.1		The CSB support coordinator will complete the respite admission application and submit to the Director of Social Work at the training center
4.2	The Director of Social Work will review for complete information and will convene the AMC for review of the request.	
4.3	By the end of the next working day following the receipt of a complete application package for a respite admission, the training center director, or designee, shall provide to the CSB written notice of his decision regarding a request for a respite admission. The notice shall state the reasons for this decision. (12 VAC 35 200-20)	
4.4	Upon admission, if the individual does not have capacity to make the necessary decisions regarding services and supports, the training center director shall appoint an authorized representative pursuant to 12VAC 35-115-146 .	
4.5	<p>Upon admission, if the individual has Medicaid, the training center shall complete the MAP119, MAP121, and MAP 121A for initiation of Medicaid payment reimbursement and mail them to the address listed below:</p> <p>Division of Long-Term Care - QMR Supervisor Department of Medical Assistance Services 600 East Broad Street, 10th Floor Richmond, Virginia 23219</p> <p>OR THEY MAY FAX TO: QMR Supervisor at 804-612-0050</p>	<p>If the individual is determined to be inappropriate for a respite admission by the training center director, within 10 working days of receipt of the decision, the CSB support coordinator, the individual, or his authorized representative may make a written request for a reconsideration of that decision, pursuant to 12 VAC 35 200-20.</p>

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V. Initial Individual Support Plan (ISP) & Discharge Planning

5.1	<p>The training center's personal support/ interdisciplinary team (PST/IDT) shall assess each individual upon admission, and subsequently at 30, 60, 90, 180 days and at all annual reviews to determine whether the training center is an appropriate setting for the individual and to review supports needed for discharge. The training center Director of Social Work shall notify the CSB Support Coordinator of the date, time, and place of the meetings at least 30 days in advance. The date of the initial 30 day meeting shall be determined on/before the day of admission to the training center. As much advance notice as possible for review dates/types should be given to the CSBs. Each training center Director of Social Work/designee will send the ID/DS Director of each CSB a listing of the dates, type of review for the coming year in January of each year for the individuals for whom the CSB is providing support coordination.</p>	<p>The CSB support coordinator shall be an active participant in discharge planning for each individual for whom the CSB is responsible. Discharge planning begins at admission, and therefore it is essential the CSB support coordinator attend, whenever possible, the 30, 60, 90, 180 day and all annual reviews thereafter and any other transitional staff meetings prior to discharge by phone, polycom, or in person.</p>
5.2	<p>On admission, a comprehensive, person-centered assessment shall be performed. A nursing assessment shall be completed at admission. A training center physician shall complete a comprehensive physical examination.</p> <p><i>Within (30) days of admission the training center will complete the comprehensive functional assessment and Individual Support Plan, based on the comprehensive functional assessment.</i></p>	<p>CSB staff shall initiate discharge planning upon the individual's admission to a training center. Discharge planning begins at the initial PST/IDT meeting using the Discharge Plan, Part B of the <i>Support for Living Booklet (DBHDS # 3321eID)</i>.</p> <p>The CSB shall complete Part B of the <i>Supports for Living Booklet (DBHDS # 3321eID)</i>. The CSB shall consult with members of the PST/IDT, the individual receiving services, the authorized representative, and with the consent of the individual or authorized representative, other parties as needed to complete Part B of the <i>Booklet</i>.</p> <p>The <i>Supports for Living Booklet</i> shall:</p> <ul style="list-style-type: none"> • Include the anticipated date of discharge from the training center; • Identify the services and supports needed for successful community living; • Specify the public and private providers that have agreed to provide these services and supports consistent with the choice of the individual; and • Identify how the training center and CSB will educate individuals and authorized representatives about community options on a regular and continuing basis (please refer to section 5.10 in this document).

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5.3	<p>The initial PST/IDT meeting shall occur within 30 days of admission.</p> <p>The meeting shall be scheduled to accommodate the individual, CSB support coordinator, training center staff, and the authorized representative to the greatest extent possible.</p> <p>The training center shall ensure the individual; CSB support coordinator and the authorized representative are notified of the date and time of the initial PST/IDT meeting, on/before the date of admission.</p>	<p>The CSB shall actively participate in person or via phone or video conferencing, if available, in the initial PST/IDT meeting.</p>
5.4	<p>The training center, in collaboration with the CSB, shall arrange for telephone or video conferencing for CSB support coordinators and authorized representatives who are invited to attend meetings but are unable to attend in person.</p>	
5.5	<p>Part A of the Supports for Living Booklet (DBHDS # 3321eID) shall be initiated by the training center at the first PST/IDT meeting and updated at subsequent PST/IDT meetings</p> <p>If the CSB staff is unable to participate in the initial PST/IDT meeting, the individual's social worker shall send a completed Part A of the Supports for Living Booklet (DBHDS # 3321eID) to the CSB within three working days of the PST/IDT meeting with a request that this information be used in the CSB's development of the Discharge Plan contained in Part B of the Supports for Living Booklet (DBHDS # 3321eID)</p>	<p>At the first PST/IDT meeting, the CSB shall complete (as much as possible) the Discharge Plan, Part B of the Supports for Living Booklet (DBHDS # 3321eID)</p> <p>If the CSB is unable to participate in the initial PST/IDT meeting, the CSB shall fill out as completely as possible the Discharge Plan Part B of the Supports for Living Booklet (DBHDS # 3321eID) using the information sent by the training center.</p>
5.6	<p>The Training Center staff shall send the completed Part A of the Supports for Living Booklet to the authorized representative for signature and will forward a signed copy to the CSB upon return.</p>	<p>The CSB shall return the completed Discharge Plan Part B of the Supports for Living Booklet to the individual's training center social worker within three working days of receipt of Part A of the Supports for Living Booklet.</p> <p>The CSB shall not complete the Discharge Plan in Part B of the Supports for Living Booklet in absence of Part A of the Supports for Living Booklet (DBHDS # 3321eID).</p> <p>If Part A of the Supports for Living Booklet (DBHDS # 3321eID) is not available at the initial PST/IDT meeting or within 3 working days following the meeting:</p> <ul style="list-style-type: none"> • The CSB shall notify the CSB ID Director or his designee, who shall notify the

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		<p>training center Social Work Director of the problem.</p> <ul style="list-style-type: none"> • If the training center does not correct the problem, the CSB Executive Director or his designee shall contact the training center Director in writing within two working days of notification by the ID Director. • If the training center still does not correct the problem, the CSB Executive Director shall notify the Assistant Commissioner for Developmental Services in writing and include supporting documentation.
5.7	<p>As an individual's supports and needs change, the training center social worker shall document changes on Part A of the <i>Supports for Living Booklet (DBHDS # 3321eID)</i> and in the individual's record.</p> <p>The Booklet will be forwarded to the CSB ID Director when changes are made and will be maintained in the individual's record.</p>	<p>The Discharge Plan Part B of the <i>Supports for Living Booklet (DBHDS # 3321eID)</i>, shall be updated and revised at the individual's annual meeting and as needed.</p>
5.8	<p>In the event that a CSB fails to return the completed Discharge Plan, Part B of the <i>Supports for Living Booklet</i> to the individual's social worker within 3 working days of the receipt of Part A of the <i>Supports for Living Booklet (DBHDS # 3321eID)</i>:</p> <p>The training center Social Work Director shall notify the CSB ID Director of the problem and document the contact in the individual's record.</p> <ul style="list-style-type: none"> • If the CSB does not correct the problem, the training center Director shall contact the CSB Executive Director to resolve the problems and issues associated with the development or completion of a Discharge Plan in Part B of the <i>Booklet</i>. • If the CSB has not corrected the problem, the training center Director shall notify the Assistant Commissioner for Developmental Services in writing and include supporting documentation. 	

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V. Continuing Individualized Support Planning

5.9	<p>The PST/IDT in consultation with CSB staff, shall, within 30, 60, and 90 days of admission and every 180 days and annually thereafter develop and update the individual's supports plan that will determine the supports to be provided to the individual.</p> <p>Training center staff, in conjunction with the CSB, shall arrange for telephone or video conferencing (if available) for CSB staff, and the individual's authorized representative if they are unable to attend PST/IDT meetings in person.</p> <p><i>The Supports for Living Booklet (DBHDS # 3321eID) both Parts A and B, will be reviewed and updated as needed, at each meeting.</i></p>	
5.10	Training center staff shall work with the CSB to identify potential community living options on a regular and continuing basis and contact the individual and authorized representative to offer to show them potential community living options.	CSB staff shall work with the training center to identify potential community living options on a regular and continuing basis and contact the individual and authorized representative to offer to show them potential community living options.
5.11	The individual's supports plan (ISP) and Discharge Plan (Part B of the <i>Support for Living Booklet</i>) shall include input from and reflect full participation by the individual, and his or her authorized representative. The individual and authorized representative shall be included in the PST/IDT meetings and shall be requested to sign the appropriate forms.	
5.12	<p>The PST/IDT shall ascertain, document, and address the preferences and wishes of the individual and the authorized representative as to the services and supports outlined in the individual's supports plan (ISP) and <i>Supports for Living Booklet</i>.</p> <p>The services and supports identified in the planning process will contribute to and be reflected in the development of the individual's Discharge Plan (Part B of the <i>Supports for Living Booklet</i>).</p>	
5.13	The training center staff, in conjunction with the individual, his authorized representative and CSB staff, shall determine at least 30 days prior to any PST/IDT meeting the date, location and time of the meeting.	
5.14	Following any PST/IDT meeting, the individual's social	The CSB support coordinator shall

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	worker shall document any changes that affect the Discharge Plan and shall ensure that the CSB support coordinator and ID Director are informed of those changes.	update the Discharge Plan (Part B of the <i>Supports for Living Booklet</i>) to ensure that the services/supports outlined are consistent with the individual's needs and desires.

VI. PREPARING FOR DISCHARGE

6.1	<p>Preparing the individual for discharge is an ongoing process in which changing supports, needs, options and choices are reviewed <i>at least</i> annually by the PST/IDT with the individual, the individual's authorized representative, and CSB support coordinator.</p> <p>Training center and CSB staff shall work together to identify community options for the individual and provide opportunities for individuals and authorized representatives to visit those options on a regular, frequent and continuing basis.</p> <p>The final Discharge Plan, Part B of the Supports for Living Booklet (DBHDS # 3321eID), shall be developed by the CSB support coordinator in collaboration with training center staff pursuant to § 37.2-505, § 37.2-806 and § 37.2-837 of the Code of Virginia and these protocols and shall:</p> <ul style="list-style-type: none"> • Include the anticipated date of discharge from the training center; • Identify the services and supports needed for successful community living, including mental health, developmental, substance abuse, social, educational, medical, employment, housing, legal, advocacy, transportation and other services; and • Specify the public and private providers that have agreed to provide these services and supports consistent with the choice(s) of the individual. 	
6.2	<p>The CSB and training center staff will consider the factors listed below when planning for community living:</p> <ul style="list-style-type: none"> • Individual's choice(s) • How the individual's medical needs can be met in the community. • How the individuals' needs will be met successfully and consistently in the community. • The supports the individual will need to function in the community. • For individuals with the dual diagnosis of MR(ID)/MI, an individual life skills support plan or a crisis plan must be included in the Discharge Plan. These plans must work in conjunction with any pre-existing MR (ID)/MI protocols developed between the facility and the service area it serves. 	
6.3	<p>Decisions regarding discharge shall be made at PST/IDT meetings in consultation with the individual, his or her authorized representative, and CSB support coordinator.</p> <p>Once it is determined that the individual will be discharged, the training center social worker shall notify the training center Director, and CSB ID Director of the decision.</p>	<p>The final Discharge Plan shall be completed by the CSB support coordinator in consultation with PST/IDT training center social worker, the individual, and his or her authorized representative within 30 days of notification.</p>

	Training Center Responsibilities	CSB Responsibilities
	<p>Members of the PST/IDT will assist the CSB staff as appropriate, to finalize the Discharge Plan, pursuant to § 37.2-505 of the Code of Virginia.</p> <p>If the CSB case manager does not complete the final Discharge Plan, the PST/IDT training center social worker may complete the plan, and the training center director shall discuss this situation with the CSB executive director to ensure the CSB meets its statutory obligations to conduct discharge planning pursuant to §37.2-505 of the Code of Virginia.</p>	<p>The CSB shall participate in PST/IDT transitional meeting(s) for coordination of the actual discharge processes.</p> <p>The CSB support coordinator shall implement the final Discharge Plan.</p>
6.4	<p>Per the Community Services Partnership Agreement, a part of the Community Services Performance Contract, when there is a disagreement regarding the appropriateness or availability of community supports and this affects the completion of the Discharge Plan, the CSB and training center staff are expected to make a reasonable effort to resolve the disagreement before sending a written request for resolution to the Assistant Commissioner for Developmental Services.</p> <p>Reasonable effort means a meeting that includes the training center's Director of Social Work, the Director of Residential Services, and the CSB ID Director, and then, if no resolution is achieved, a meeting that includes the training center's Facility Director and the CSB Executive Director.</p>	

VII. Transitional Staff Meetings/Planning

7.1	The Training Center Director of Social Work/designee is responsible for determining the individual's needs and levels of support with respect to transitional planning on a case by case basis.	The CSB shall participate in PST/IDT transitional meeting(s) for coordination of the actual discharge processes.
7.2	The Training Center Director of Social Work/designee will coordinate, collaborate and ensure effective communication with the CSB Support Coordinator, the individual, the AR, and all other parties as deemed necessary for effective and successful transition planning.	The CSB support coordinator shall update and implement the final Discharge Plan as required by § 37.2-505 of the Code of Virginia.

Training Center Responsibilities	CSB Responsibilities
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VIII. COMPLETING THE DISCHARGE PLAN

8.1	<p>At time of discharge, the individuals' training center social worker shall compile a packet of information that will include:</p> <ul style="list-style-type: none"> • Final discharge summary, which includes date of discharge, lists appropriate services and supports and the providers that have agreed to provide them, and identifies the CSB support coordinator. • Medical history and current medical information signed by the training center physician. A discharge physical will be performed by a training center physician prior to discharge. Also, within 30 days of actual discharge, the training center physician will include a statement indicating that the individual is free of communicable diseases. • A copy of the most recent ISP (PCP ICFMR packet), and the long form of the Supports Intensity Scale (SIS™) will be provided at the time of discharge if not previously provided during the transitional meetings or application process to the new residence/provider. 	<p>A signed copy of the Virginia Home and Community Based Waiver Choice of Providers (DMAS 460) shall be placed in the individual's discharge packet.</p>
8.2	<p>Before discharge, the social work director, in collaboration with CSB staff, shall ensure applications for Medicaid, Medicare, Social Security Benefits, and release of any individual's personal funds and other final entitlements are submitted to the appropriate agencies/departments. Applications shall be initiated in a timely manner prior to discharge.</p>	<p>The CSB staff shall be responsible for following up on applications submitted by training center staff and accessing any financial assistance and benefits for which the individual will be eligible after discharge and for identifying a representative payee, if necessary.</p>
8.3	<p>To facilitate follow-up, the training center social worker shall notify the CSB of the type of entitlement application and the date on which it has been submitted with copies sent to the CSB, individual, and his authorized representative.</p> <p>Once discharge has occurred, the training center shall notify the Social Security Administration of the individual's change of address to facilitate the transfer of the individual's financial benefits including SSDI/SSI.</p>	

	Training Center Responsibilities	CSB Responsibilities
	Once discharge has occurred, the reimbursement office staff will notify DMAS of the discharge.	
8.4	The training center will provide follow-up services to the new provider/individual for a period of 1 year from the date of discharge. Follow-up may include but not be limited to, at least 1 face to face visit; phone contact with the individual/or AR and phone or face-to-face contact with the provider.	

IX. Transfer of CSB Support Coordination Responsibility

	Training Center Responsibilities	CSB Responsibilities
9.1	A transfer of support coordination or case management responsibility shall be initiated when the individual receiving services or his authorized representative decides to relocate or requests a transfer to another CSB service area upon discharge from the training center.	See "Virginia Case Management Transfer Procedures for Persons with Mental Retardation" written by the VACSB ID Council – Attachment A. This protocol addresses case management/support coordination for Waiver services.
9.2	<p>When the decision to transfer CSB support coordination responsibility upon discharge is expressed to the training center staff, the training center social worker shall indicate this intention and the reasons in the individual's Discharge Plan.</p> <p>Prior to any further discussion with the individual or his authorized representative, training center staff shall contact the current and prospective CSBs.</p>	<p>When the decision to transfer CSB support coordination responsibility upon discharge is expressed to the current CSB support coordinator, the CSB shall indicate this intention and the reasons in the individual's record. The CSB support coordinator shall contact the training center staff and the CSB in whose area the individual or his authorized representative has decided to relocate upon discharge.</p> <p>Upon notification, the two CSBs shall begin collaboration regarding the Discharge Plan and the new CSB support coordination staff's participation in future PST/IDT meetings.</p>
9.3		The current CSB support coordinator shall communicate effectively and provide information to the prospective CSB support coordinator about the individual's Discharge Plan.
9.4	Training Center staff shall communicate effectively and keep both CSBs informed of discharge and transfer plans.	Both the current and prospective CSB support coordinators shall develop a support coordination transition plan, which shall specify the date on which support coordination responsibility shall transfer. Each CSB is responsible for notification to the individual and the AR of the date of change, all appropriate contact information, and any other transition information needed.

	Training Center Responsibilities	CSB Responsibilities
9.5		The current CSB shall provide support coordination for the individual until the transfer of support coordination or case management responsibility is complete.
9.6		If the two CSBs cannot agree on a transition plan before the individual is discharged, they shall seek resolution from DBHDS Central Office staff.
9.7	Training center staff shall notify the Master Trainer for the Supports Intensity Scale™ (SIST™) at the training center who will in turn, notify the DBHDS CO –Community Resource Manager, in charge of the SIST™ implementation, of the date of discharge, date of transfer to the CSB, and the CSB support coordinator who will be working with the individual, in order for the SIST™ to be transferred to the appropriate CSB.	.